Quick start guide to KI-ELN, downloaded client

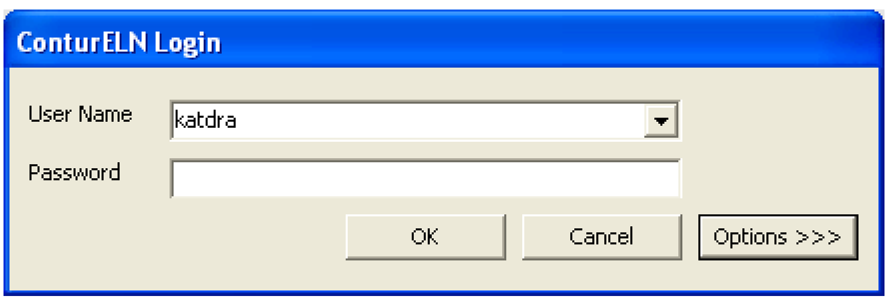
Conventions used in this tutorial

Bold – a button
<u>Underline</u> – selection from a menu
Italics – Right mouse-click menu item

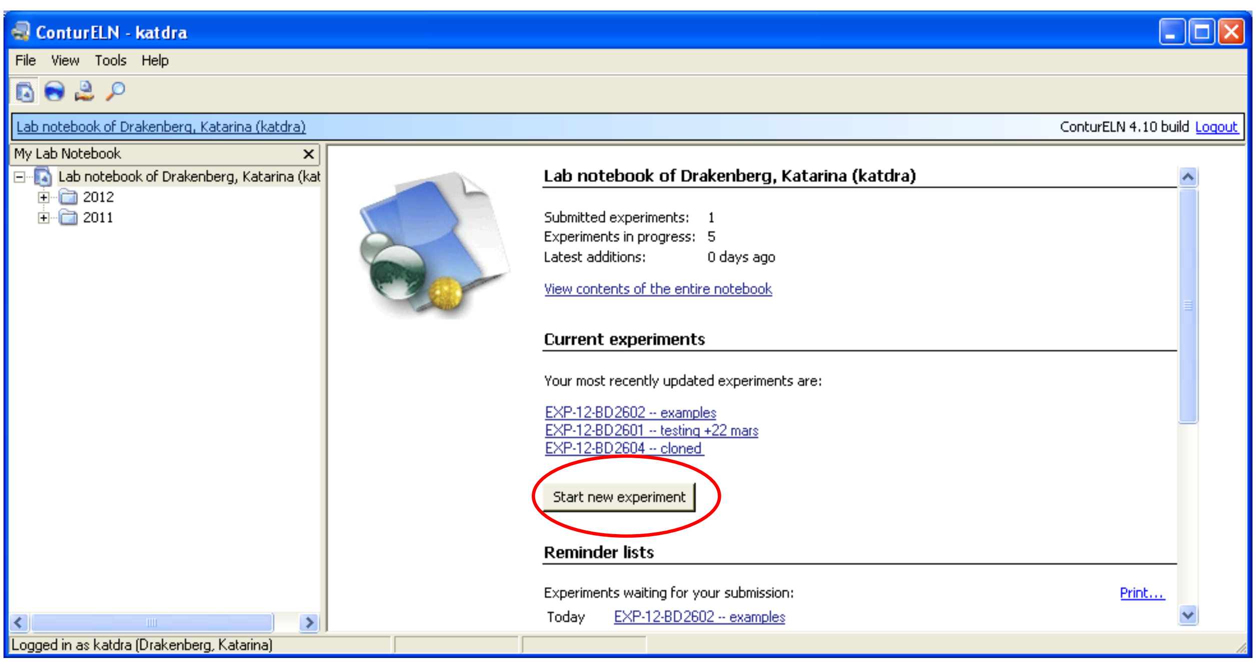
You can access the system in three different ways; through a client downloaded on your computer (only PC), remote desk top access to the downloaded client (for MAC), or through a Webb client on the internet.

The downloaded client (same client for MAC using remote desktop) is recommended if you are working on a PC since it has more functionality than the Web version at this time.

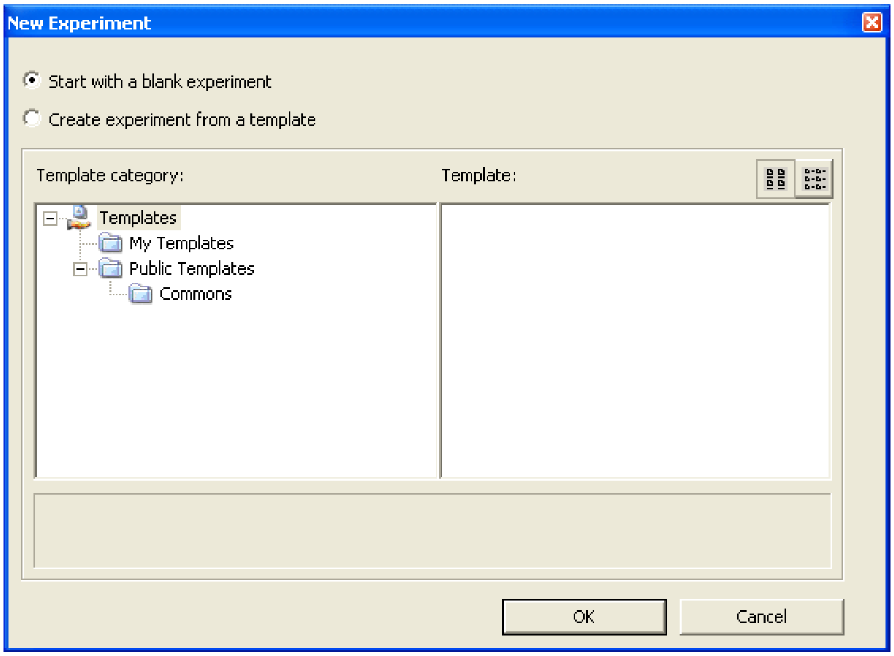
Start the program and login with your user name and password



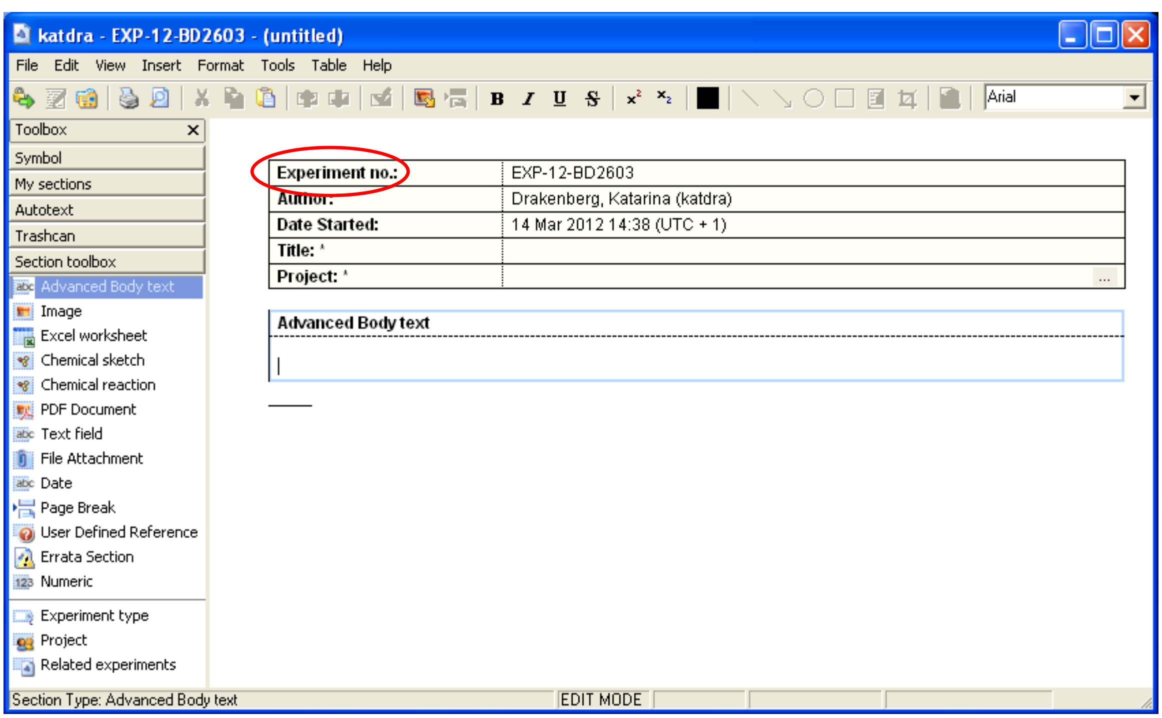
You can now create your first entry (called experiment). Press **Start New Experiment.**



Select either “Start with a blank experiment” or “Create experiment from template” if you or your research group has pre-made templates, then press **enter** or **OK**. (More on templates later)

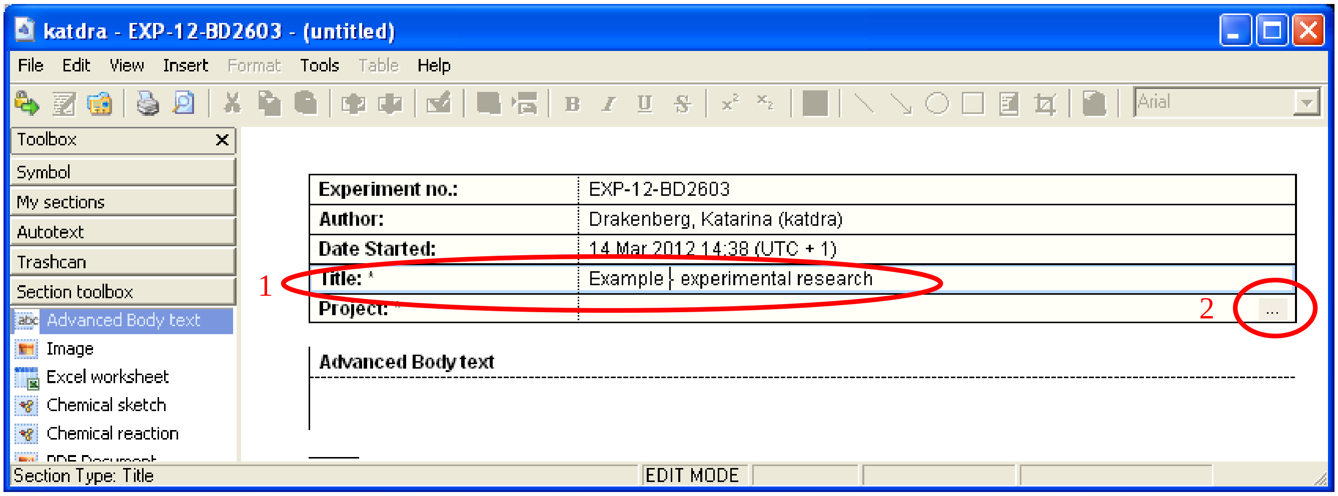


The “experiment” is created and you see it in the KI-ELN editor. Experiments are made up of sections. Your experiment always starts with six sections. The top three sections cannot be changed or removed. The experiment is given a unique experiment number, and the first time you start an experiment the consecutive 99 experiment numbers are reserved for you.

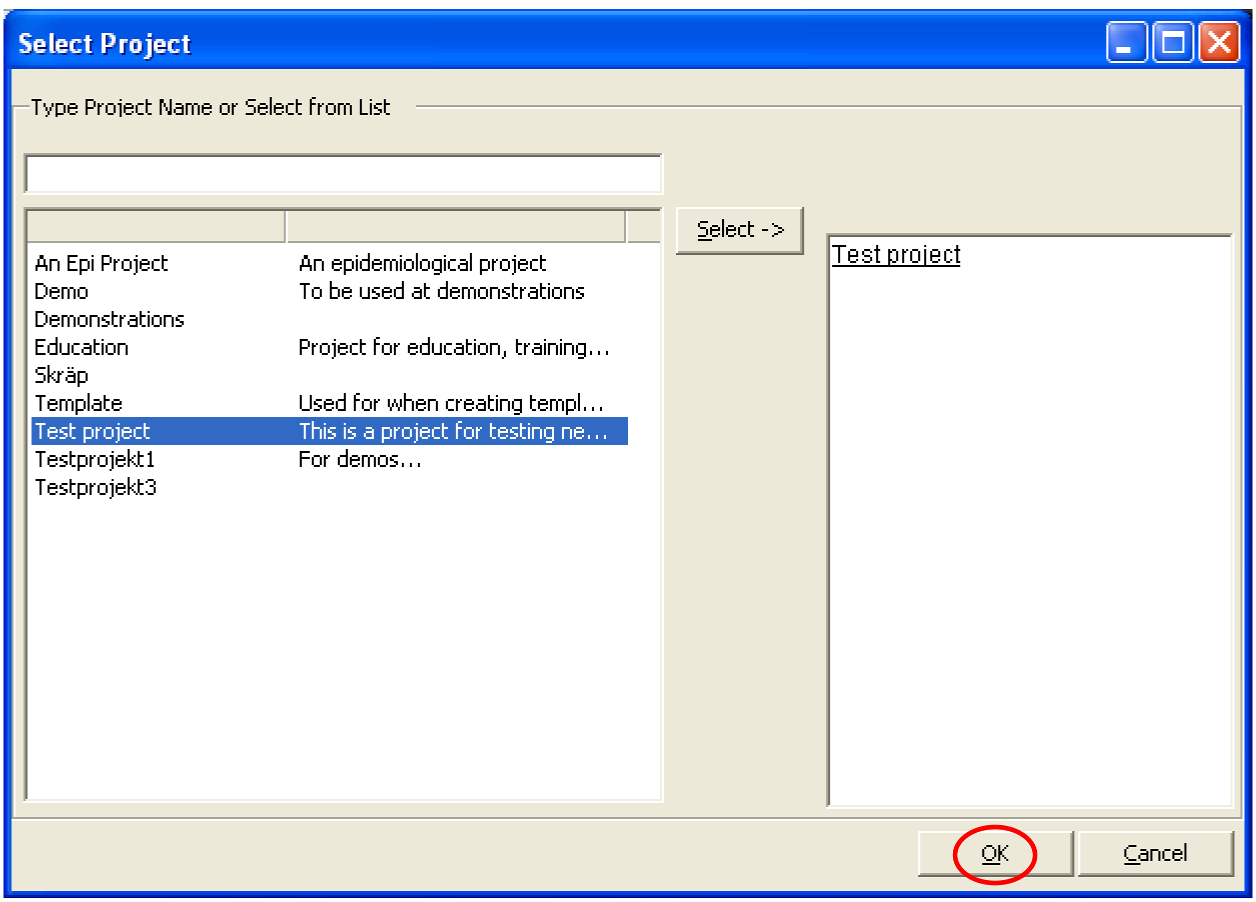


1. Type the name of your experiment in the section Title.

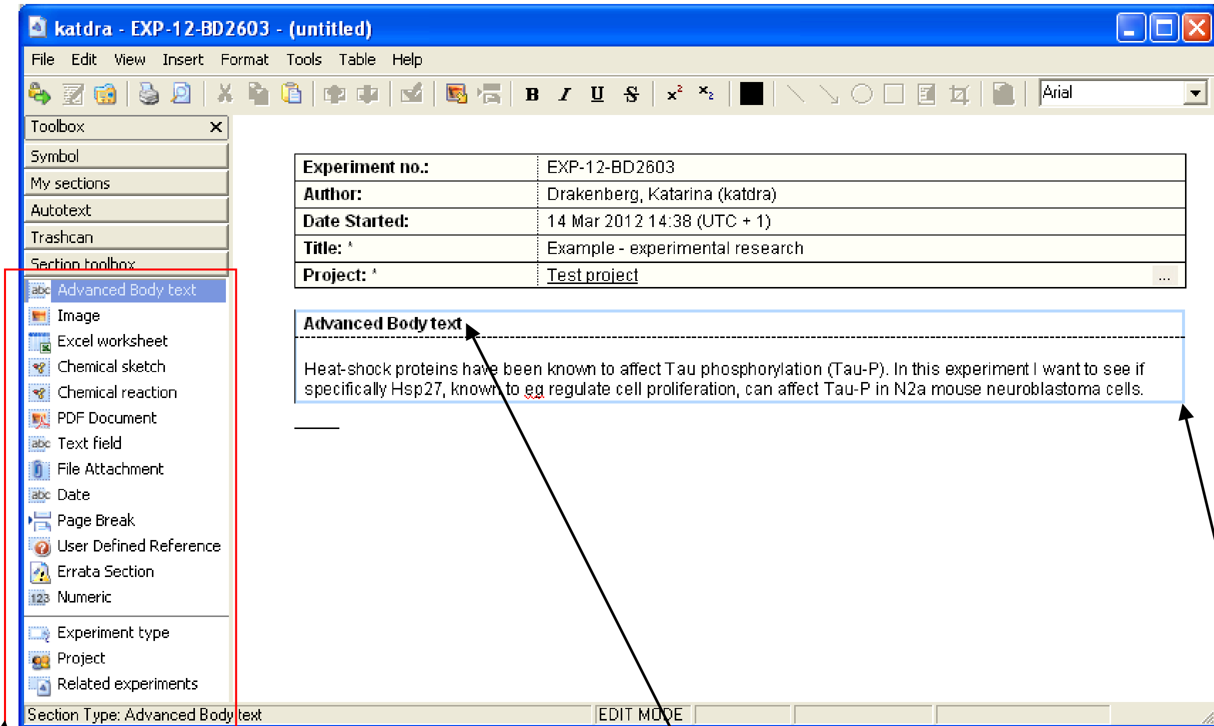
2. Next, choose the project to which the experiment belongs by clicking in the box to the right, with three dots inside. If you don't see any projects listed contact the superuser in your research group. It is the superuser who creates the group's projects and who gives rights to group members to connect their experiments to projects.

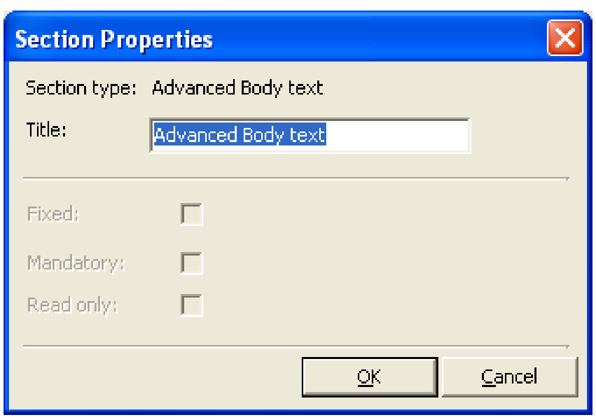


Double click on the appropriate project name (or click once + **Select)** and then click on **OK**.



You can now start typing or copy/paste text in the Advanced body text section.





<u>Rename section</u>
Change any section title by double clicking in the Section title area. The section properties window opens and you can type in a new title, then click on **OK**.

<u>To highlight a section</u>, click in the section's title area. A highlighted section has a darker blue frame.

<u>Add more sections</u>
More sections can be added below a highlighted section by double clicking the section type in the section toolbox to the left of the screen. Different sections are used for different content. Add for example an Excel section by double clicking on Excel worksheet. Or add any other section by double clicking on its icon in the section toolbox.

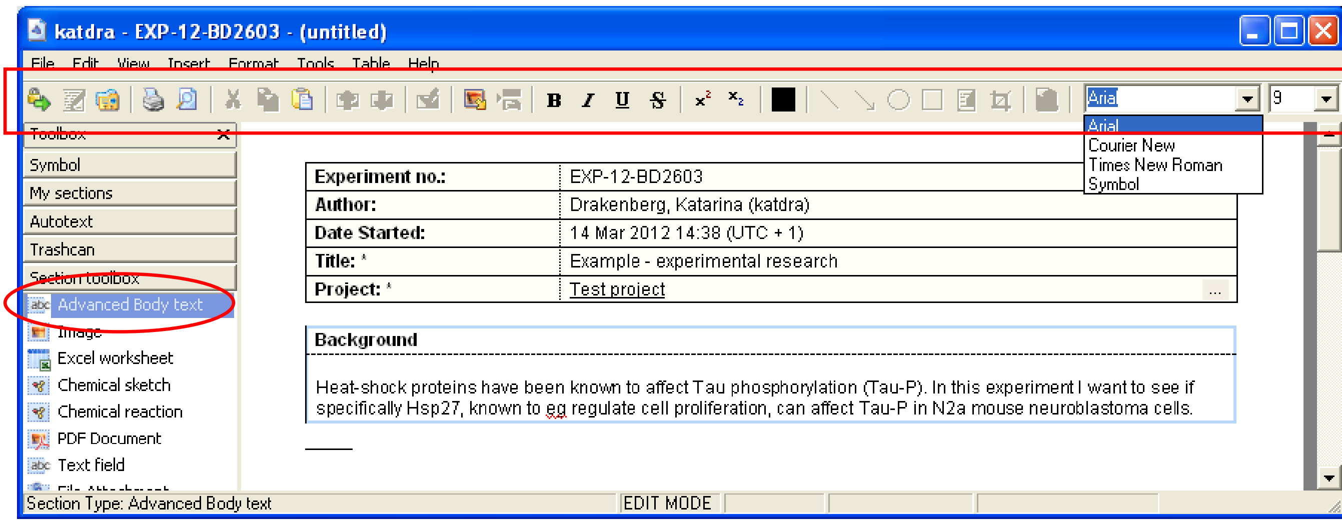
<u>Move a section</u>
Sections can be moved up and down within an experiment, highlight (blue frame) the section you want to move and use the yellow arrows on the toolbar to move it.

<u>Remove sections</u>
You can also remove sections by highlighting a section and then right click in the section title area and choose Delete, or just press **Delete** on your keyboard.

TEXT SECTIONS

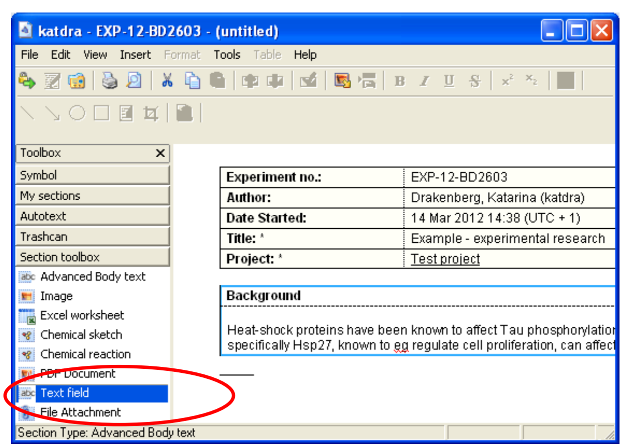
Advanced Body text section

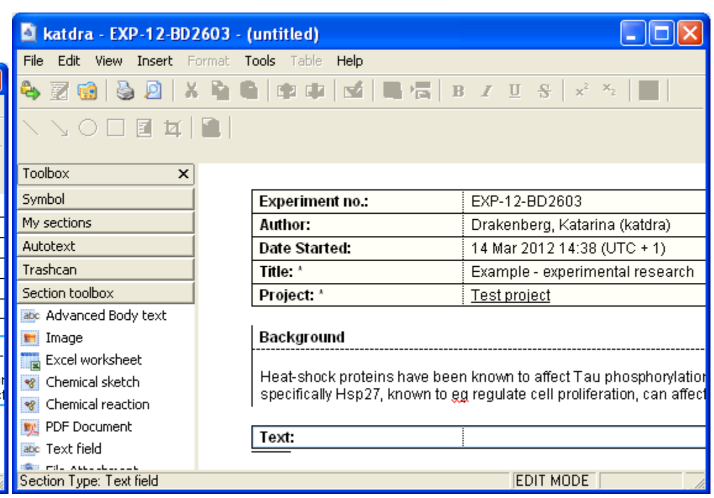
You can either type text into the text field or copy/paste text from another document. Edit the text using the tools in the tool bar. You have more editing options in this client compared to what is available in the Web client.



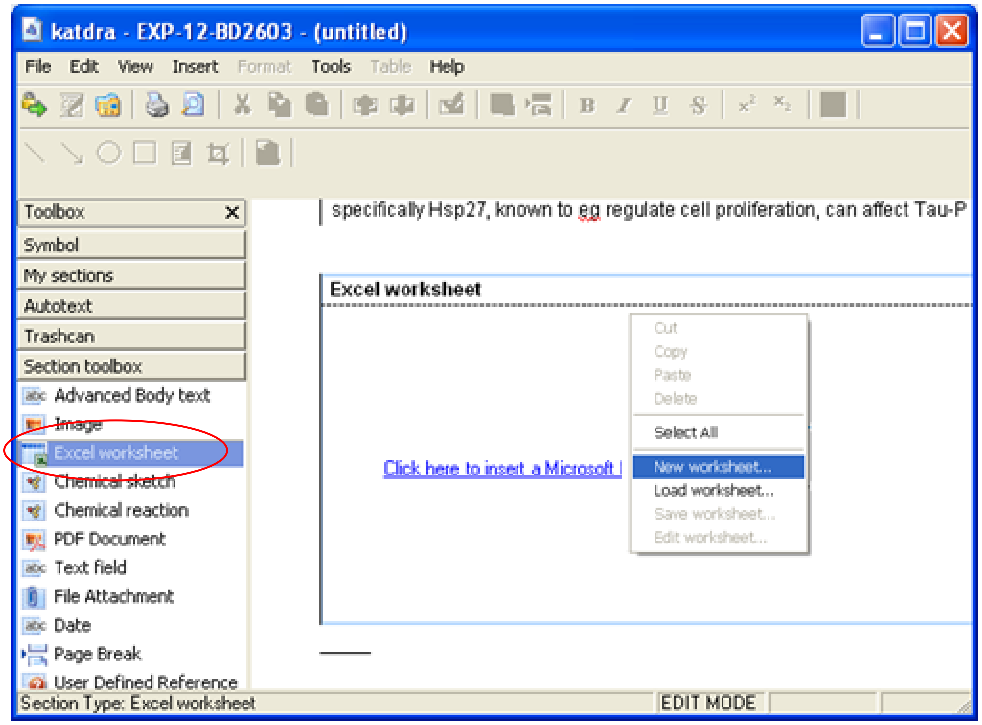
Text field

This section can be used for example to list keywords. Highlight the section under which you want to add this section, and then double click on **Text field** in the section toolbox.



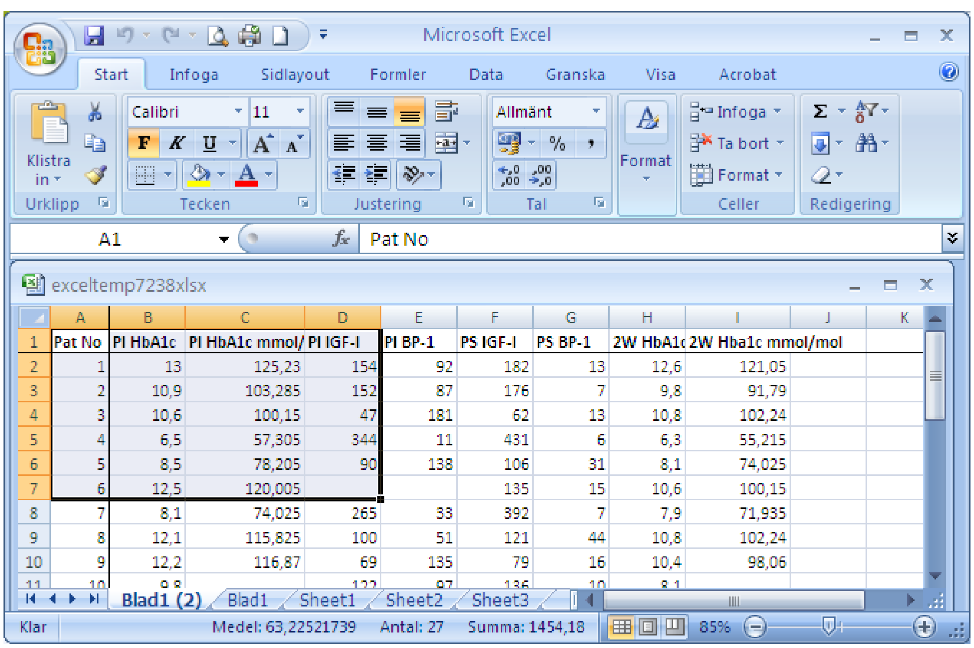


EXCEL SECTION



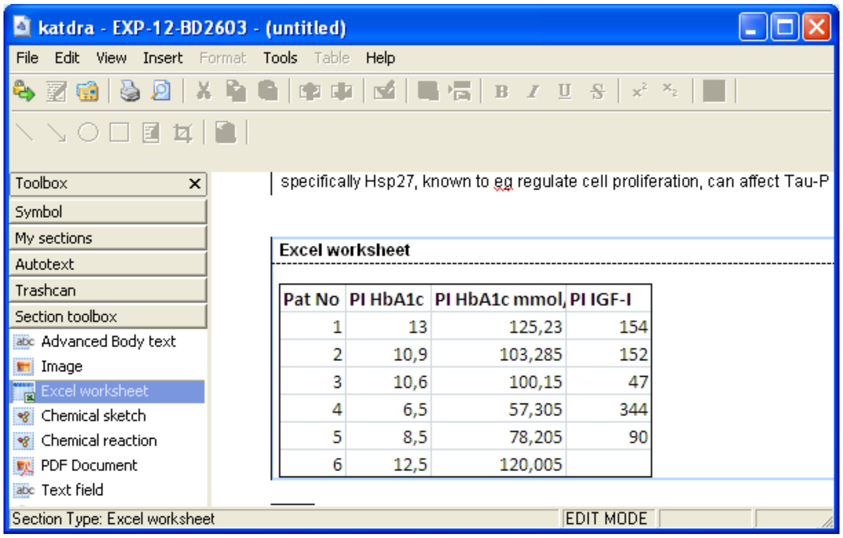
Add an Excel section by double clicking on the **Excel worksheet** in the Section tool box. You can import an Excel file or start with a blank sheet.

To start with a blank sheet right click in the section and select *New worksheet.*

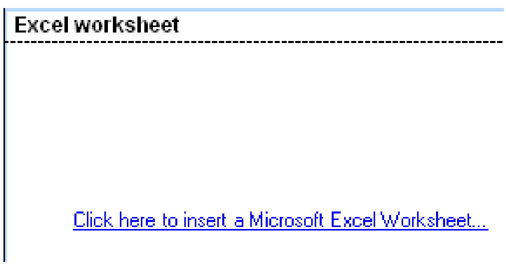


Excel opens and you can enter data. Select the cells that should be displayed in the ELN, save then close Excel (or the worksheet), or if you want to insert the entire work sheet close Excel without selecting any cells.

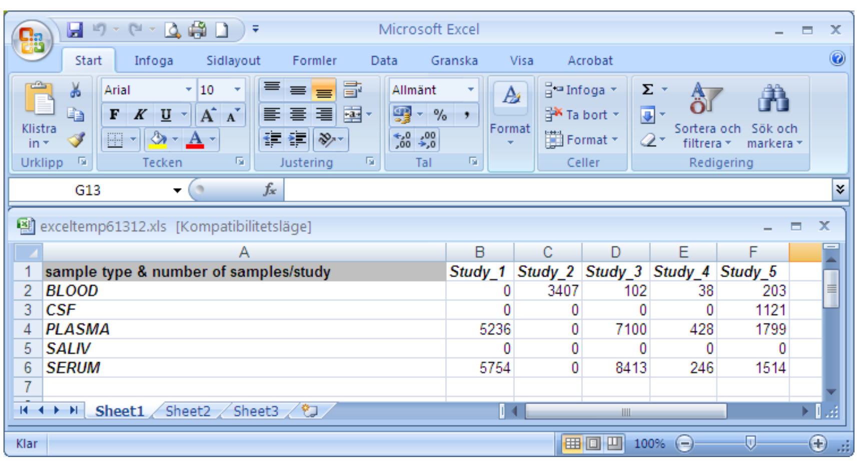
The data is imported into the experiment. The Excel file is also saved in the experiment.
The worksheet can be opened and edited by double clicking on it.



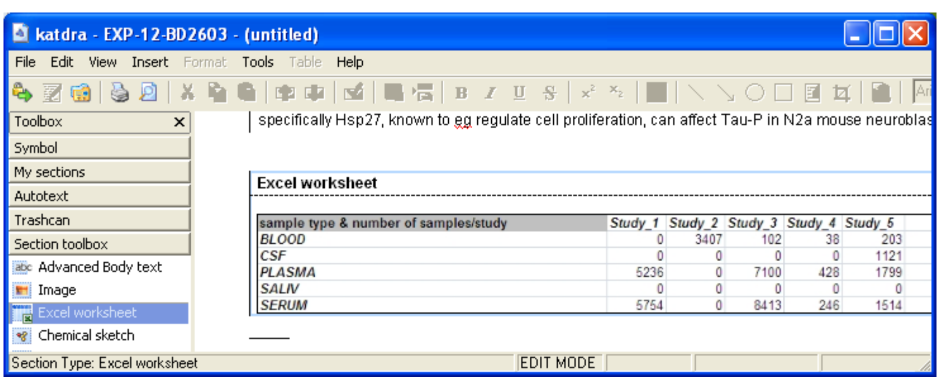
Only the selected cells are shown.



To import an existing Excel file, click once on the link Click here to insert an Excel Worsksheet…Browse to find the document you want to insert.



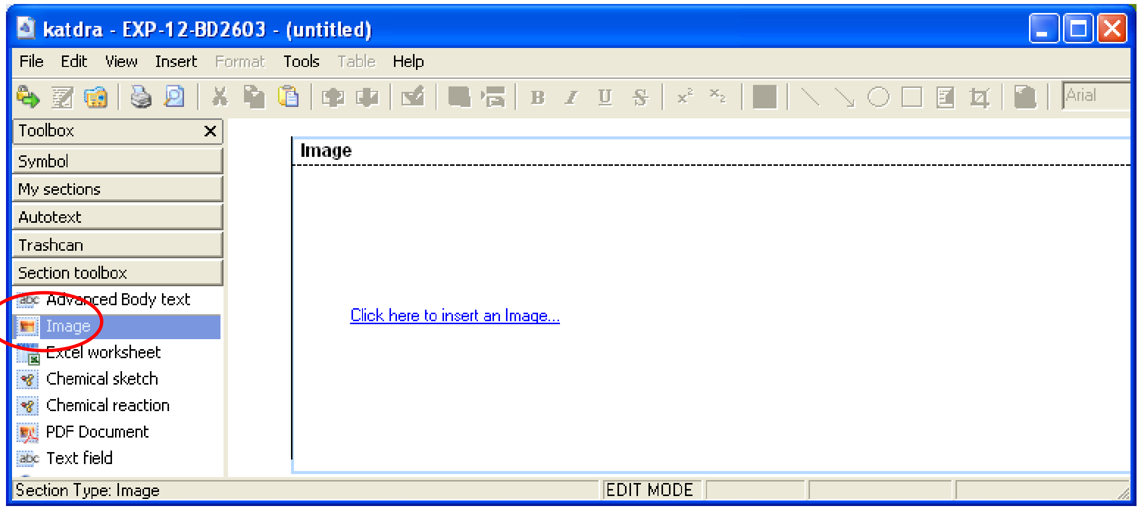
Select the cells that should be displayed in the ELN, save then close Excel (or the worksheet), or if you want to insert the entire work sheet close Excel without selecting any cells.



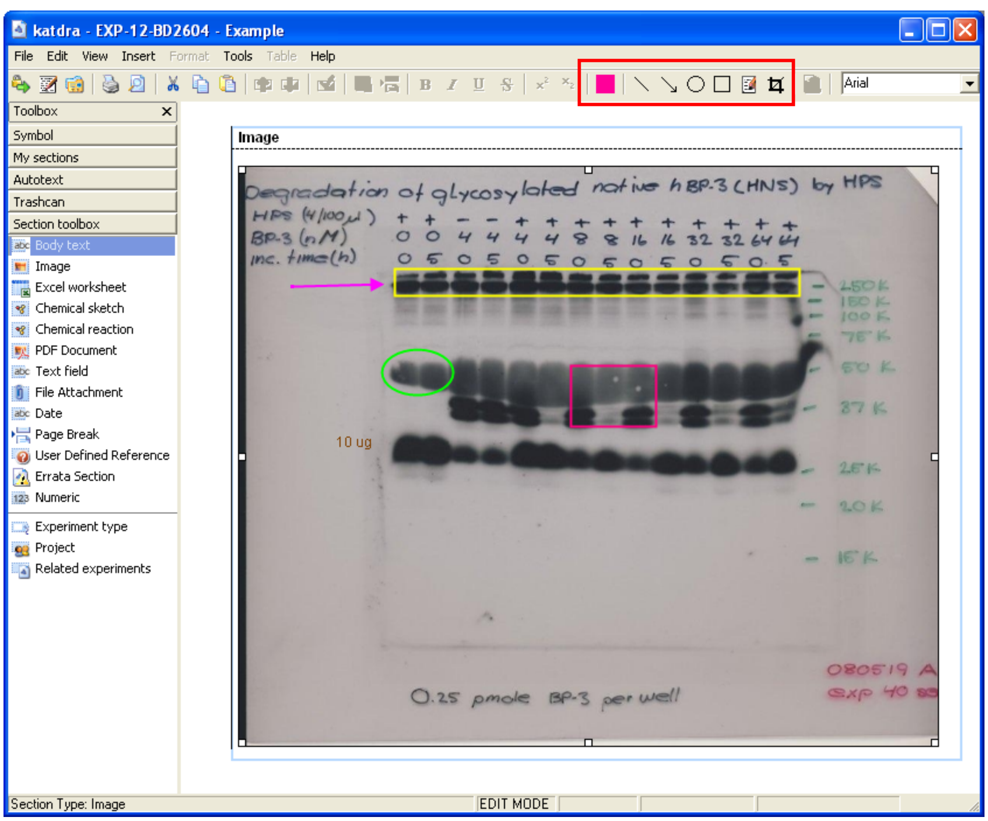
The whole table is shown.

IMAGE SECTION

Double click on **Image** in the section toolbox.



Click on the link Click here to insert a new image... Browse your files and select the correct one. In the desk top client it is possible to upload images of format: *.jpg, *.jpeg, *.gif, *.png, *.bmp and *.tiff. (If the file is very large an image compression window opens. Images are compressed to save space in the database) Click **OK**.



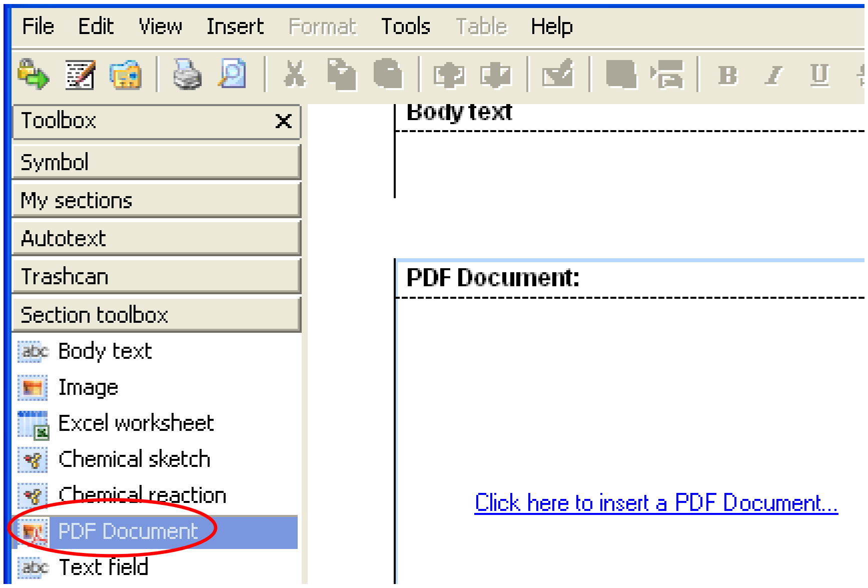
Text, arrows etc can be added and the image can be resized and cropped using the image annotation tools.

You can also double click on the image and make annotations using the standard program Paint.

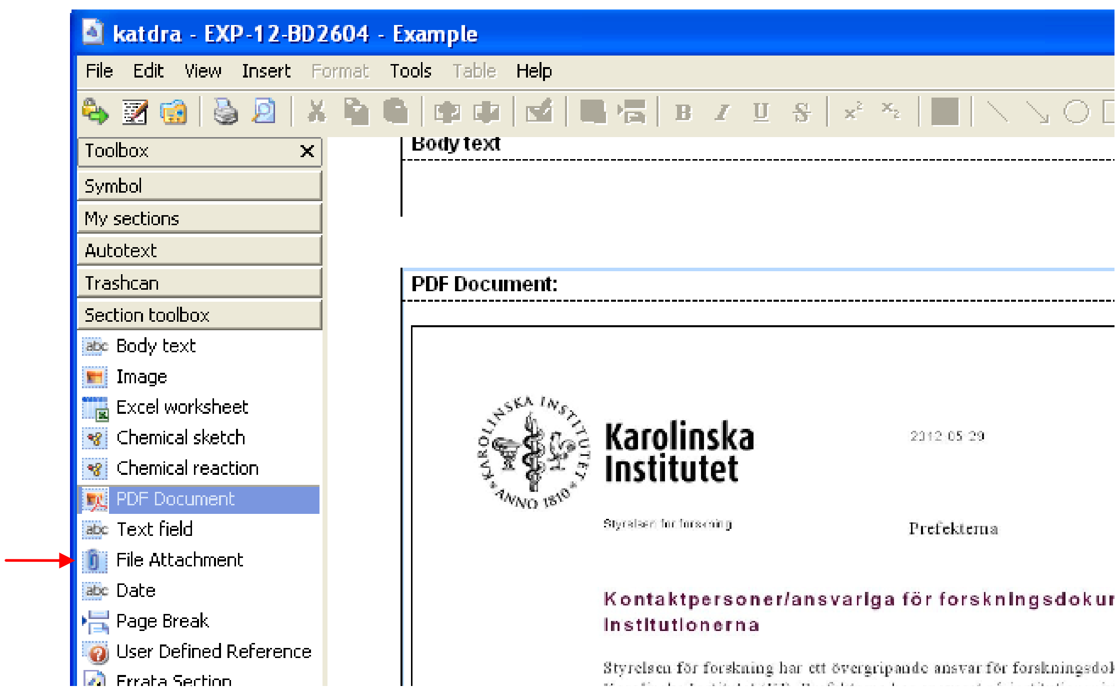
More details can be found in the help menu under Inline annotations program.

PDF section

Add a PDF Document section by double clicking in the section toolbox.



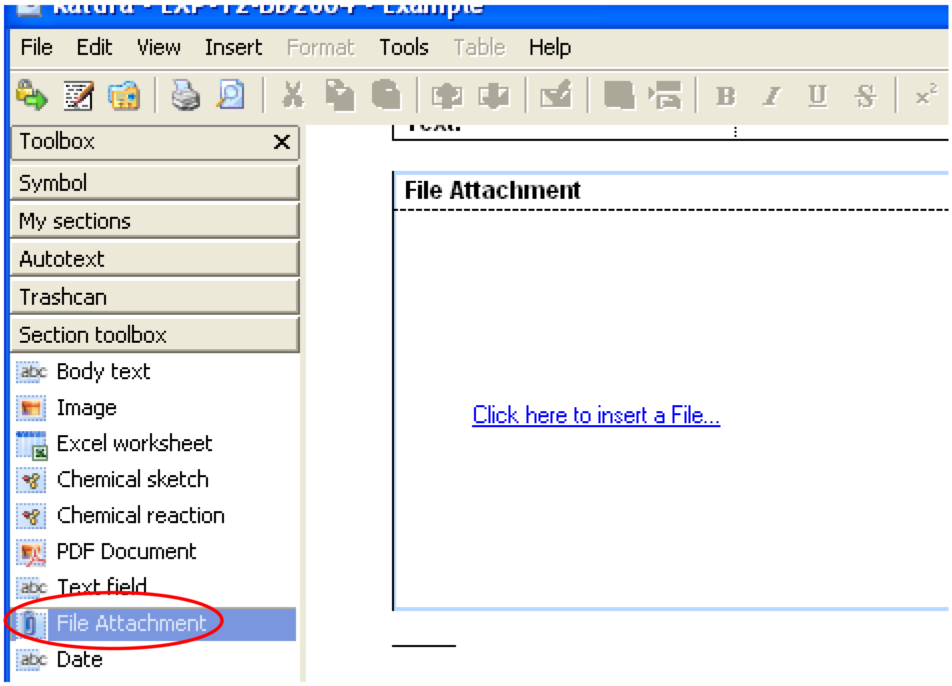
Click on the link [Click here to insert a new PDF Document](), select file. The PDF document is saved in the experiment. All the text in the PDF section is searchable.



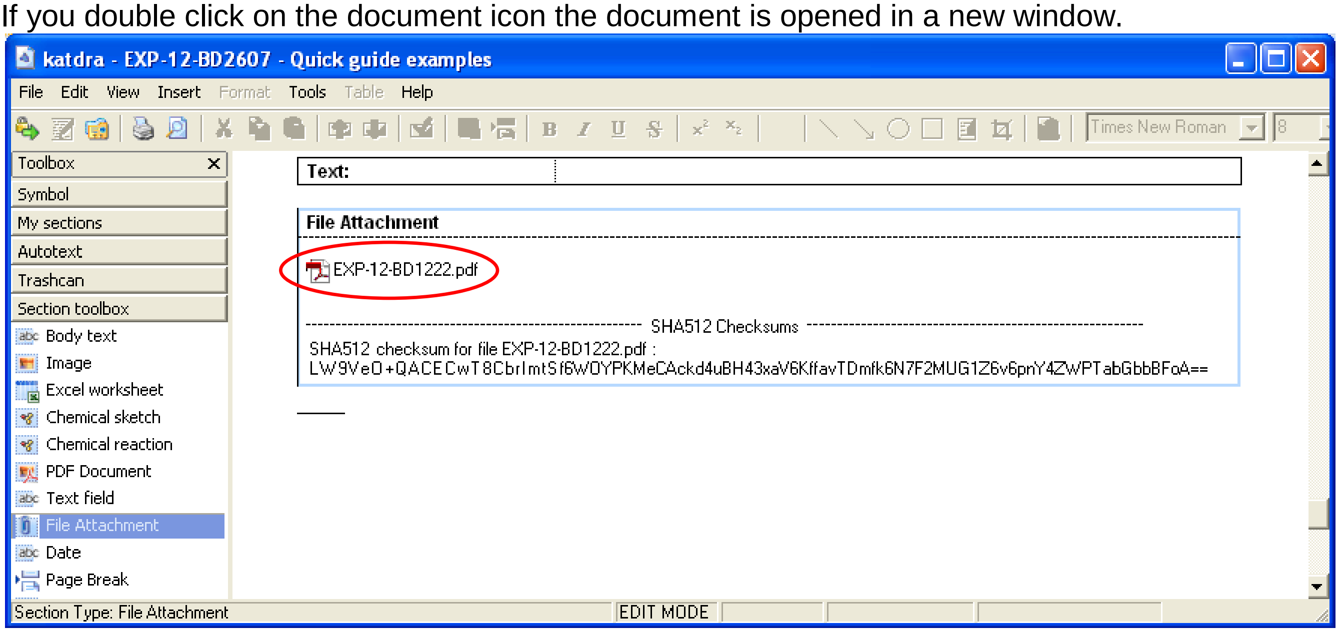
The size limit for the PDF to be displayed is 10 pages. Longer documents have to be attached as a file (see next page).

File attachment

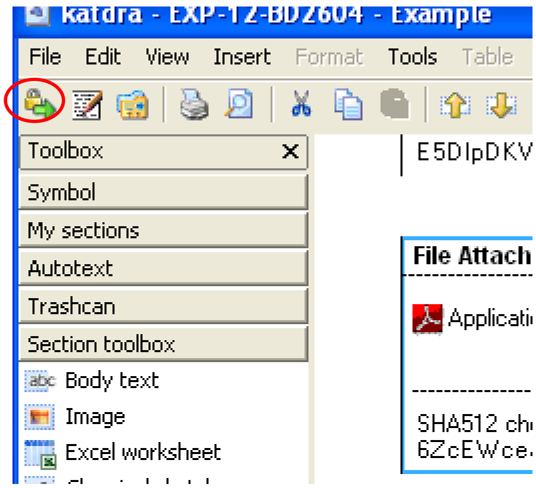
Add a File attachment section by double clicking in the section toolbox, then click on the link Click here to insert a File, select file. The document is saved in the experiment. All the text in the document is searchable.



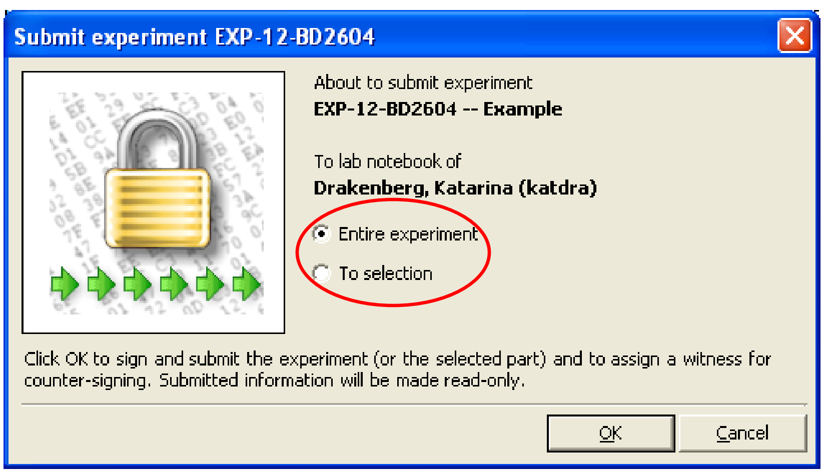
If you double click on the document icon the document is opened in a new window.



Submit an experiment

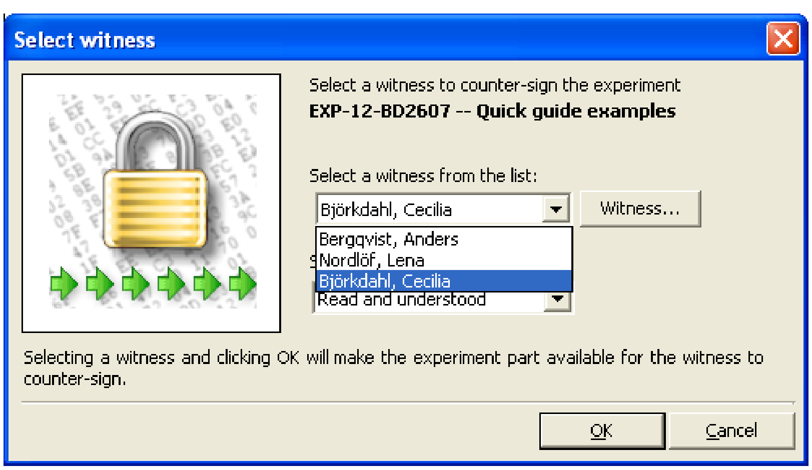


To submit an experiment you click on the **Submit** button



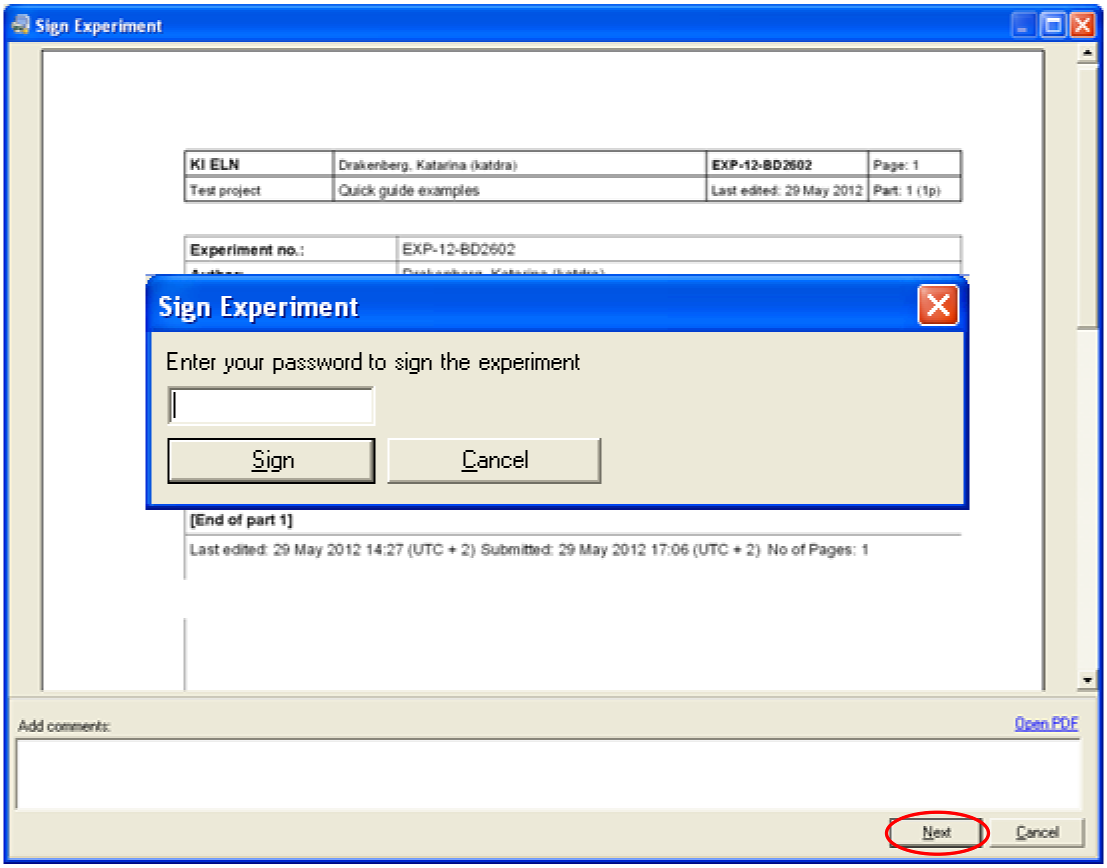
You can choose to submit the entire experiment or partially up to a certain section. Click on **OK**.

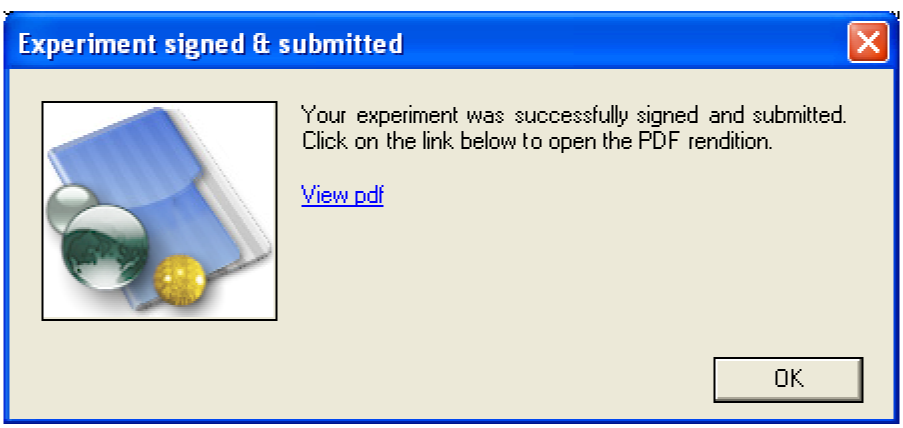
The system creates a PDF document of the experiment and sends it to the server. This may take a few minutes for a large experiment.



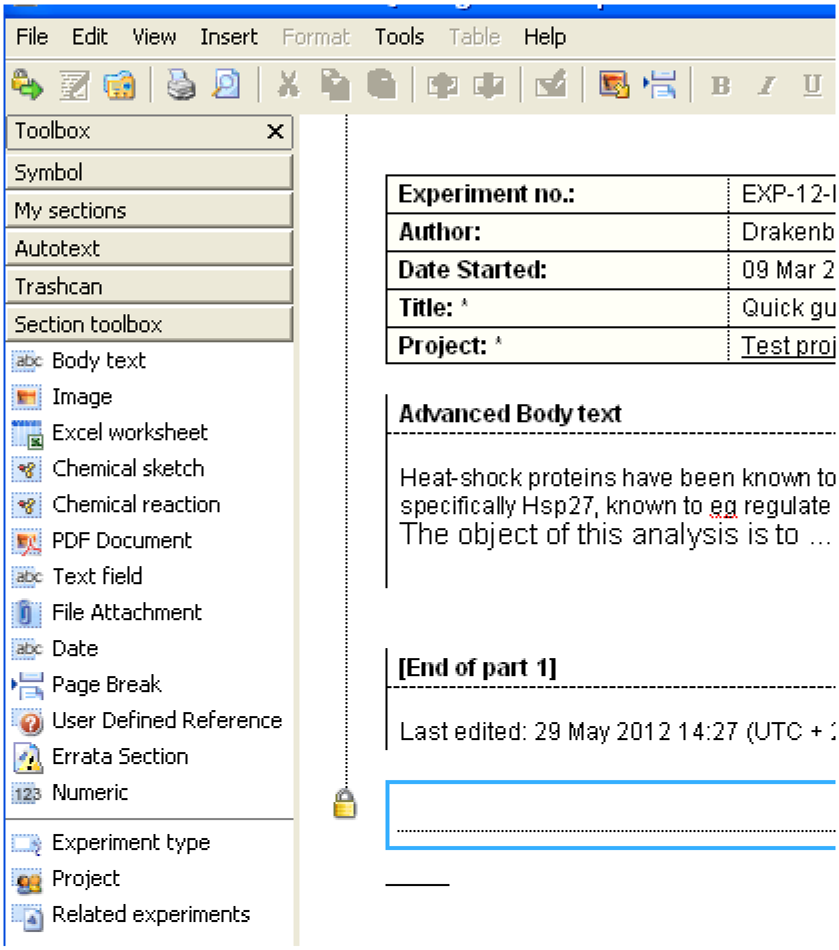
Select a witness to countersign

Now you must sign the experiment. After adding comments (optional) click on Next, then you sign by entering your KI-ID password (same as you use to login to eg ELN and Webmail)



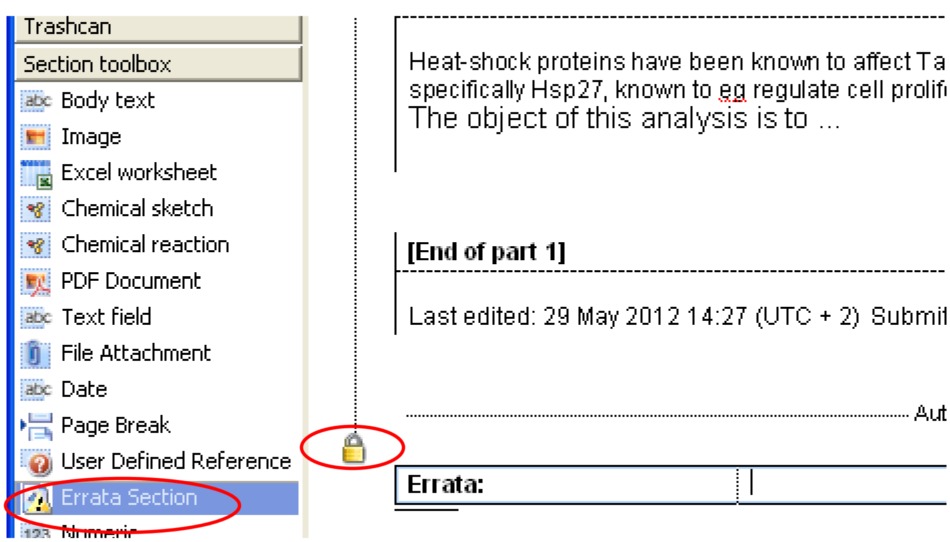


You can view the submitted experiment as a PDF.



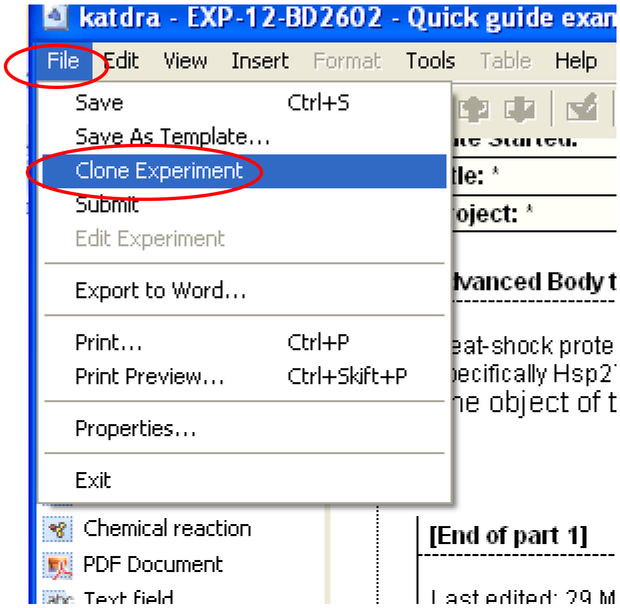
The sections are now locked (note the padlock on left hand side).
Although the sections are locked you can add new sections.

If there is an error in a submitted experiment, you can add an Errata section.



Cloning an experiment

You can save time by copying sections between experiments, cloning experiments and using templates.



To make a clone of your experiment chose File, Clone Experiment. A new experiment is created. The new experiment is the same as the previous one except for the Experiment number, Author and Date started. The title is also blank.

Templates

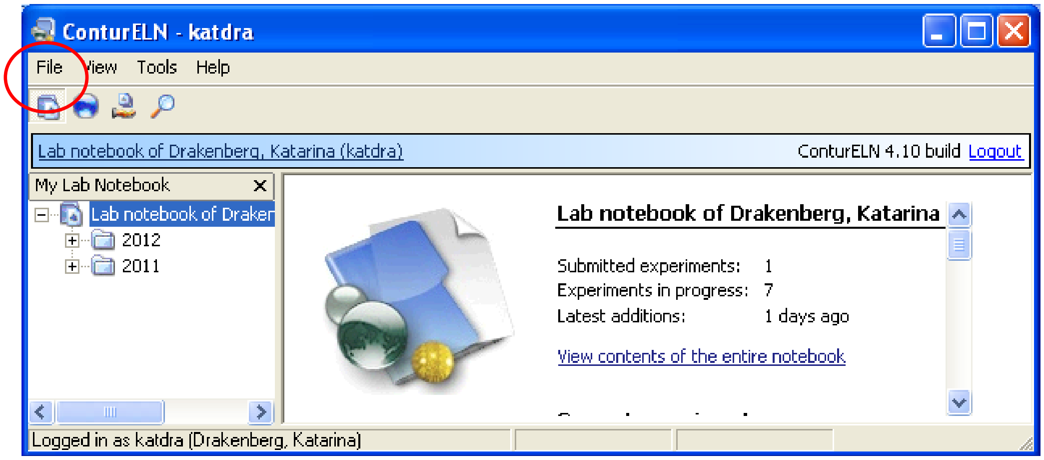
Templates can save time and can also add structure to experiments. Every user can create their own “private” templates that will be found under **My Templates**. But a user, given the specific privilege ELNGLOBALTEMPLATEADMINSTRATOR, can also create **Public Templates**. This right is administrated by a Superuser in the research group (see the Superuser manual for details on how to do this). You can either build a template from start or make a template from an existing experiment.

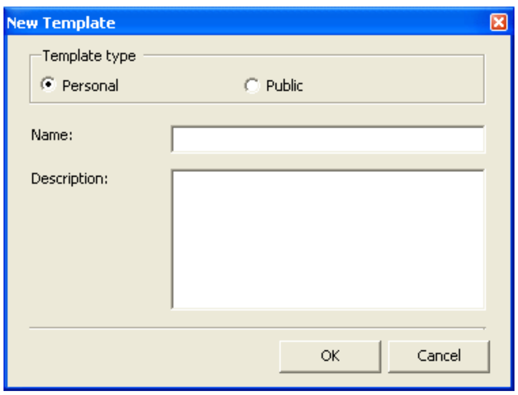
<u>Create a template project</u>

In order for **Public Templates** to be visible and searchable for other group members the template must include a project. This is not necessary for My Templates. Even though a template is stored using one project, the project can be changed when the template is used for an experiment. It is recommended that a Superuser creates a group specific “template project” (see the Superuser manual for details on how to do this) that can be used when creating new templates.

Below will follow a description on how to create Public Templates, this can also be used for My Templates and any differences will be noted in the text.

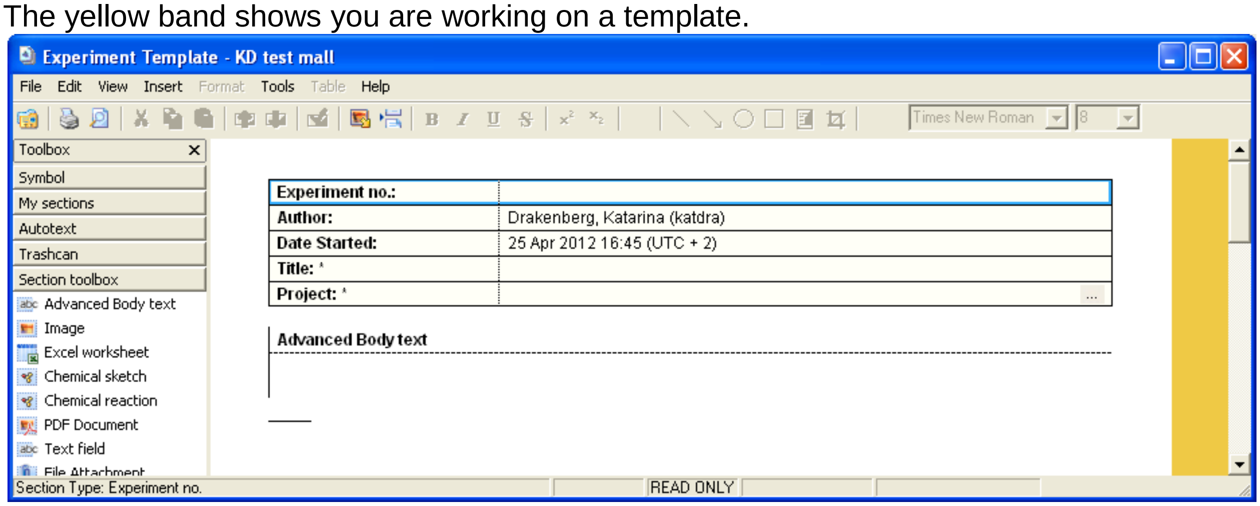
Templates can be created either by opening an experiment and choosing Save As Template under File or directly on the overview page by choosing New Template under File.





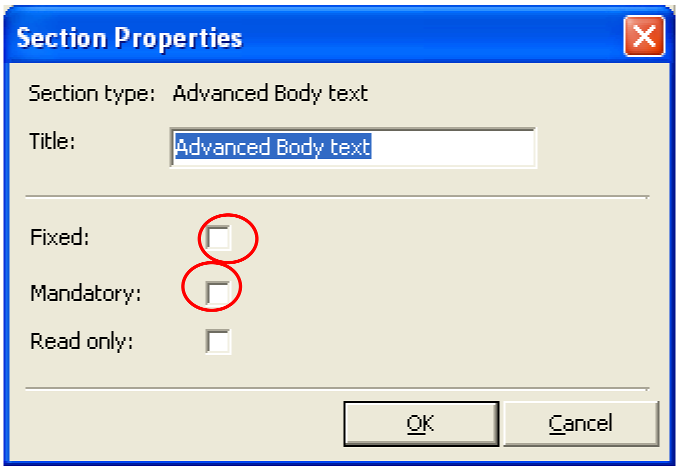
Choose if the template should be available only for you (Personal) or available for your research group (Public). Give the template a name and short description and click **OK**.

The template editor opens. This works in exactly the same way as the experiment editor. The yellow band shows you are working on a template.

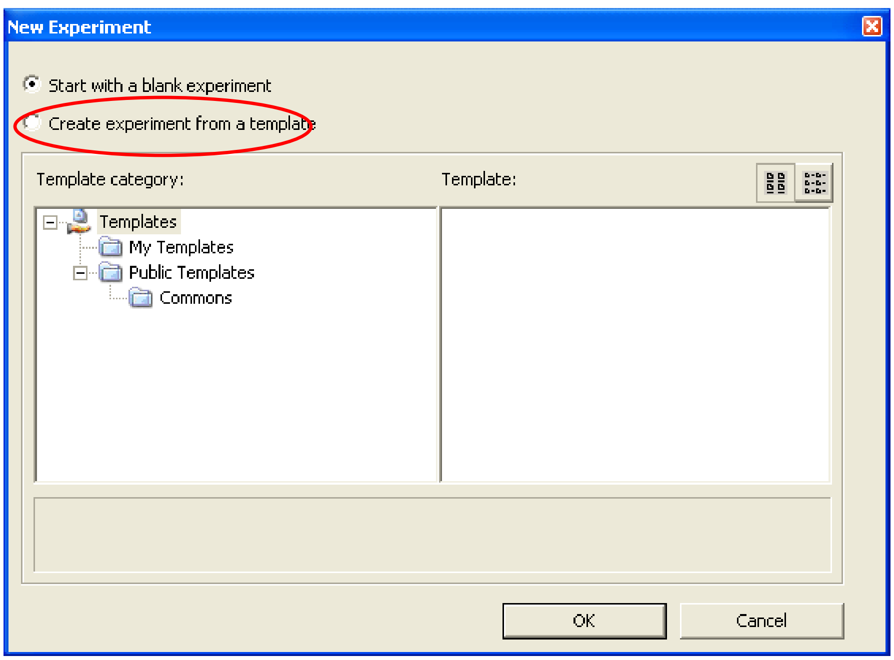


The creator of the template can then choose which sections should be included in the template and if text, tables etc should be predefined. Public Templates should ideally be discussed within the research group and agreed upon before they are used. This will promote standardised methods and will save time when starting a new experiment.

It is possible to make some or all of the sections mandatory by right clicking on the section and choosing Properties. Under Properties the box labeled Mandatory is checked before clicking on OK. This can be changed at any time. You can also choose make sections fixed (can't be deleted).

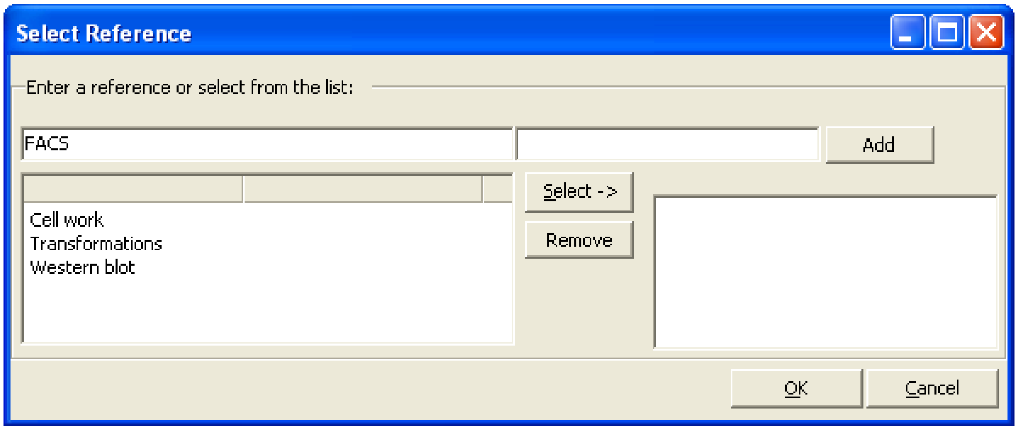


Start an experiment using an existing template
Click on **Start new experiment** button and then choose Create experiment from a template



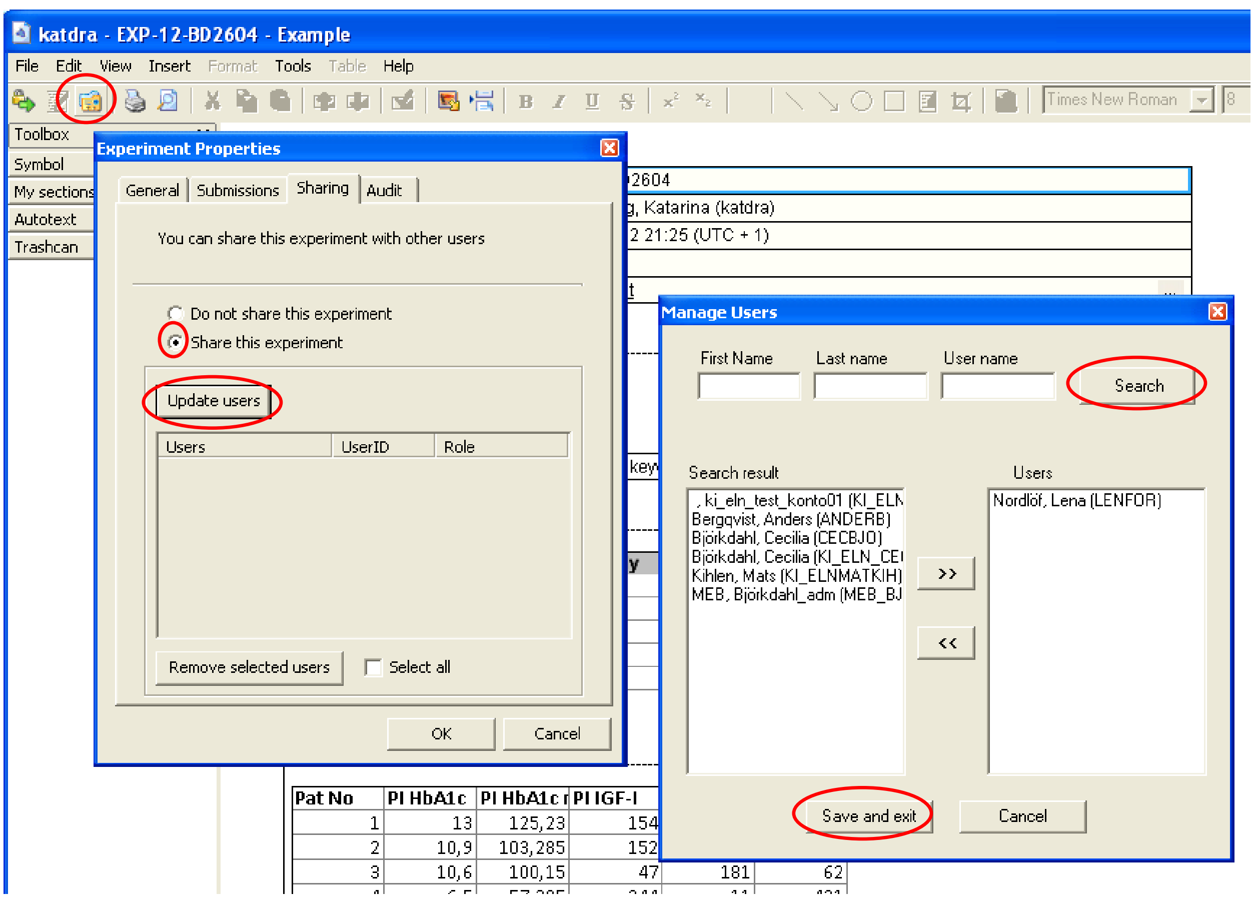
User Defined Reference

This section is used to make lists of predefined values. (At this time it is not only possible to add a User defined Reference section if you are working with the Web client)

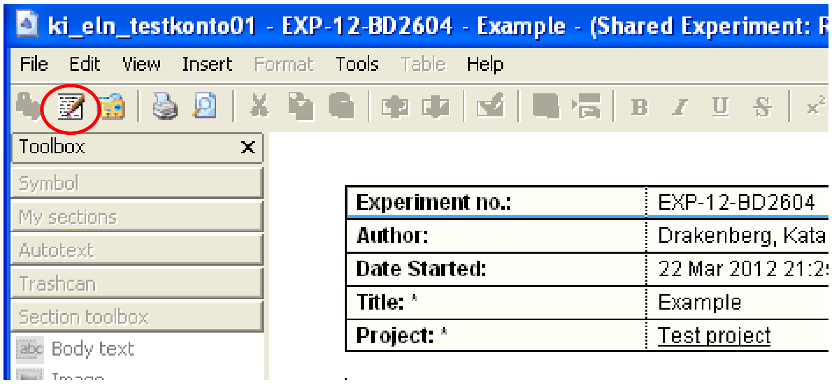


Sharing experiments

Click the Properties button on the toolbar (or File, Properties). On the Sharing tab, select Share this experiment. **Update users**.

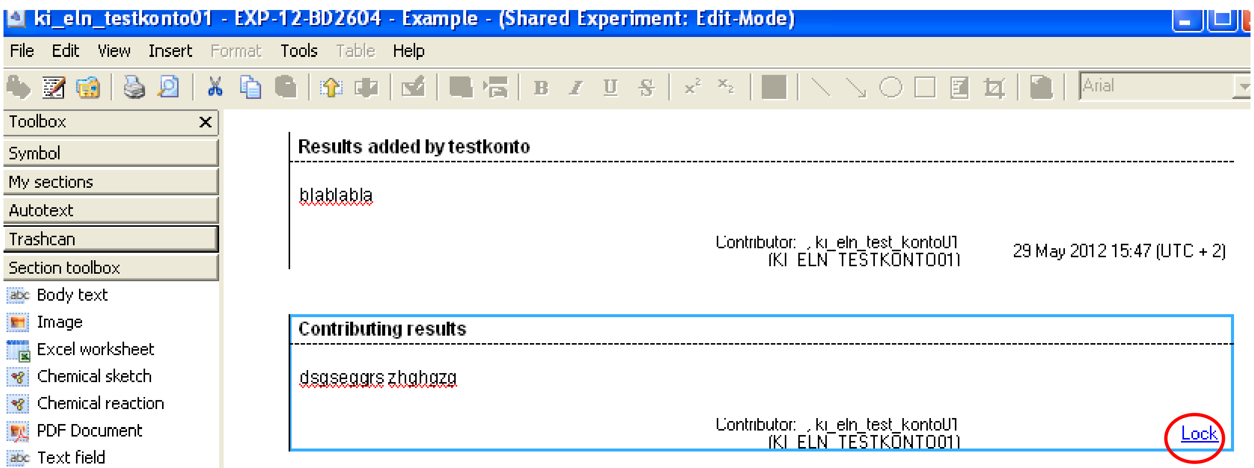


Search for your colleague and then **>>** to add them. **Save and exit. OK**
Your colleague will now see your experiment in their list of current experiments.



When your colleague opens the experiment they must press the Edit Experiment button (or File, Edit Experiment) to take control of the experiment. Only one user can edit an experiment at a time.

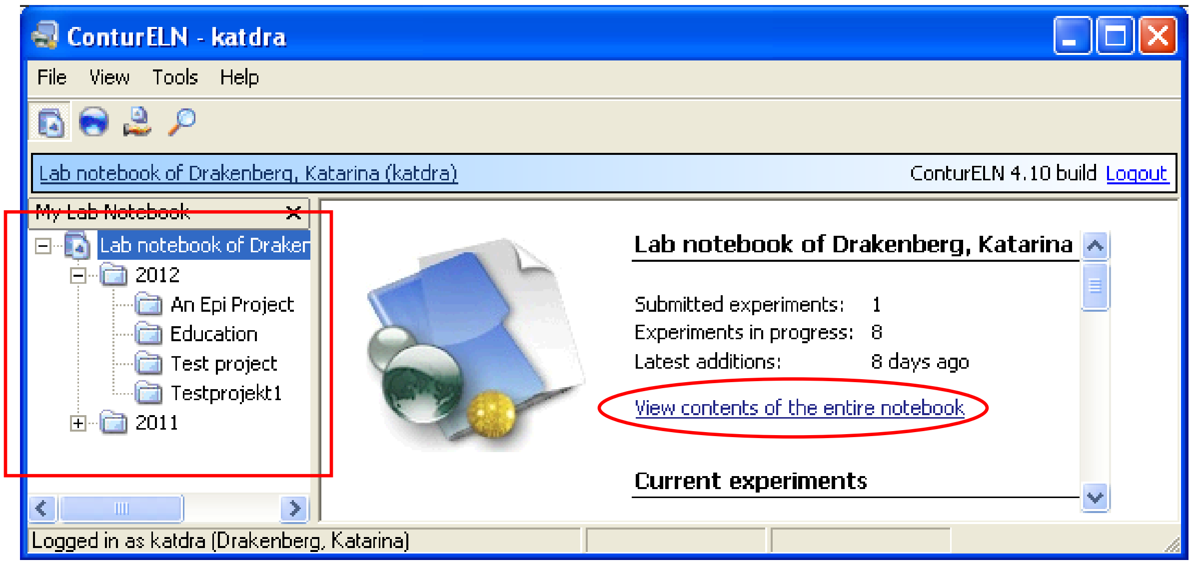
The contributor then adds their sections.
When they are finished with a section they click on Lock.
The experiment can then be continuously edited or submitted by you.



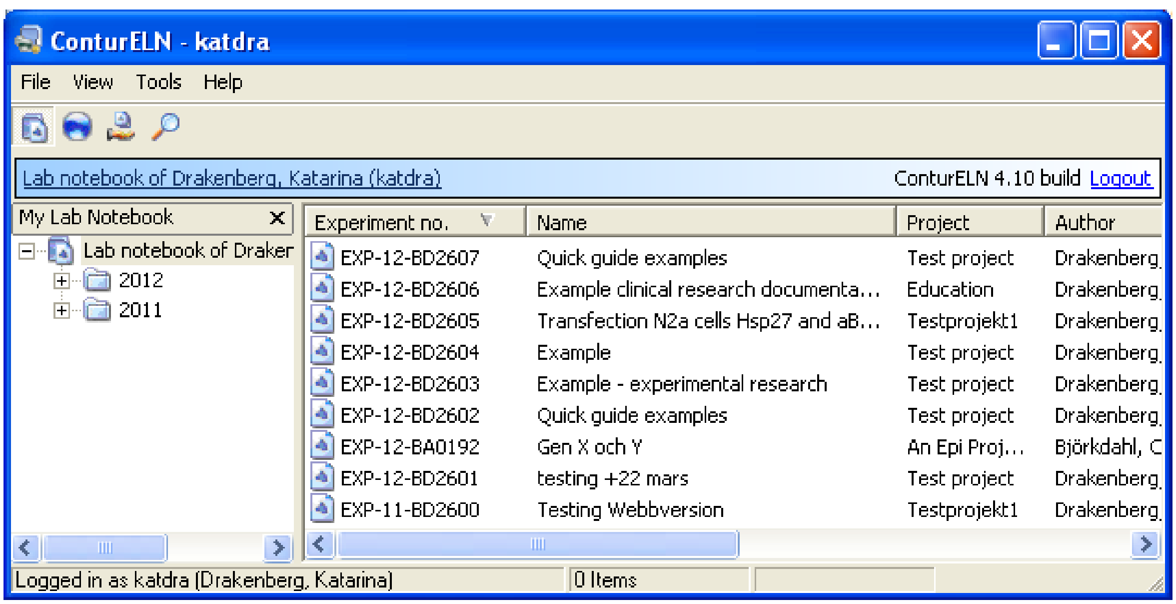
One of the great advantages of an electronic lab notebook is browsing and searching.

Browsing experiments

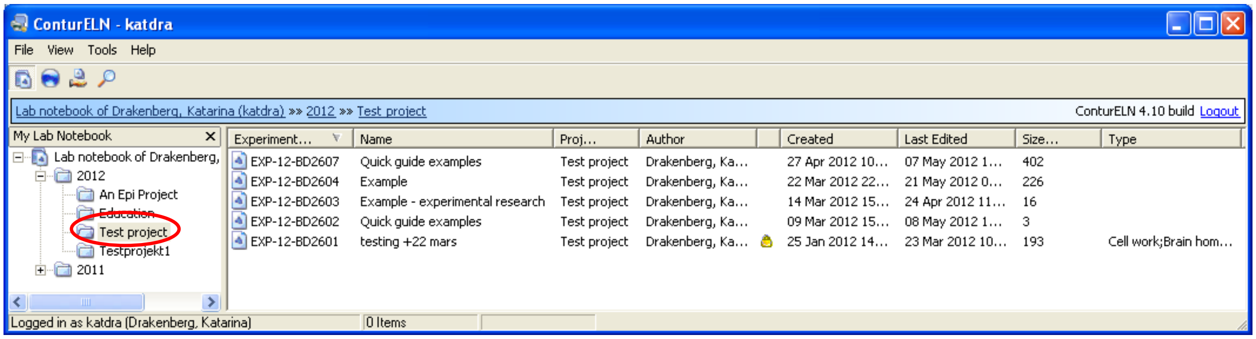
All experiments are sorted into folders by user, project and date.
At the left hand side of My Lab Notebook, you can browse through these folders.

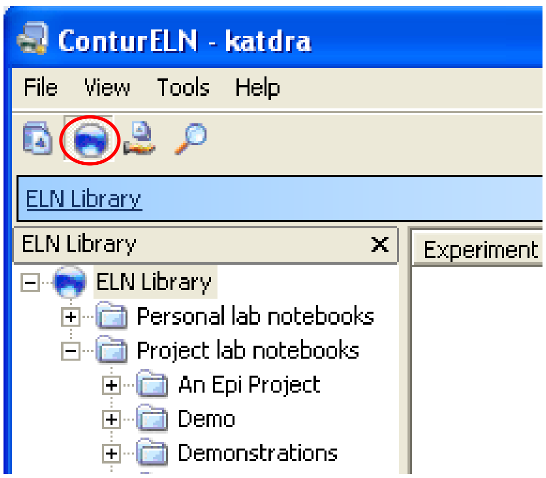


You can also see all you experiments from the link View contents of the entire notebook.



Click on a folder to get a list of the experiments. The list can be sorted by clicking a column in the table title bar.

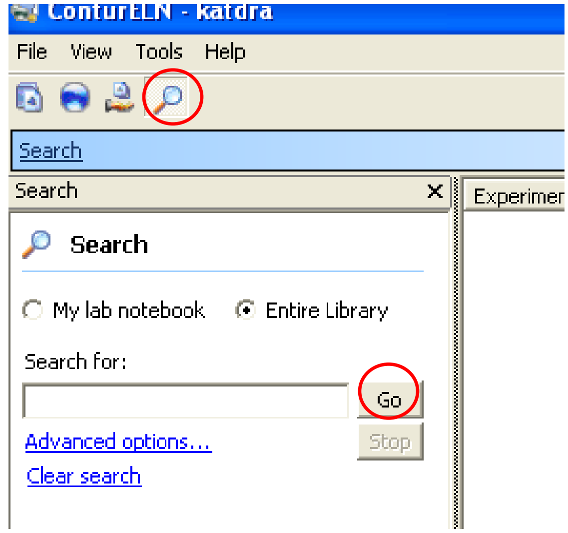




Click on the ELN library button. Here you can browse through all the experiments sorted by author and project.

Search for experiments

To search for experiments, press the Search button on the explorer bar.

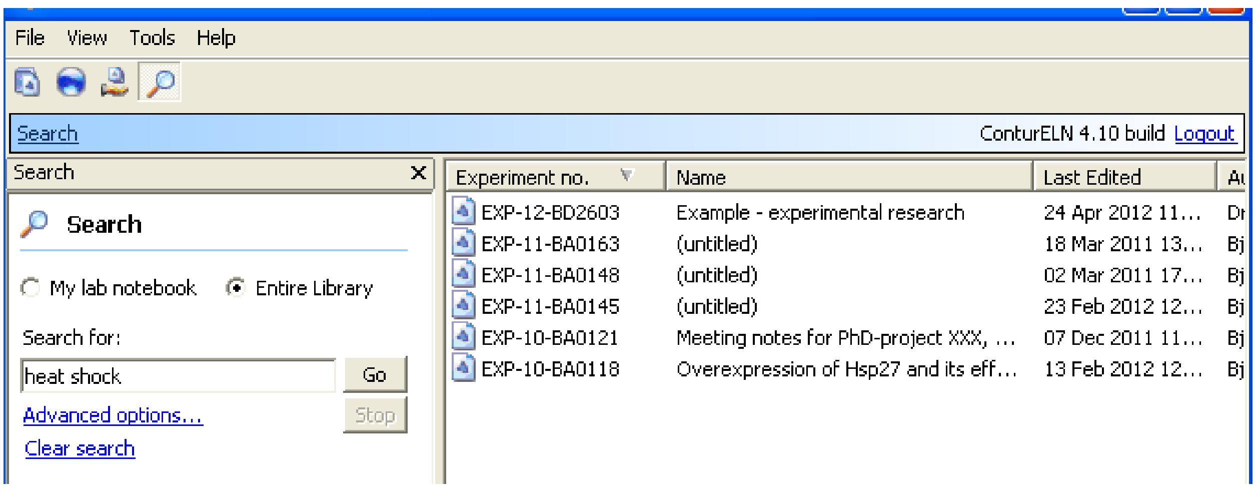


You can choose to search in your own experiments or all experiments in your group's library.

Enter some text in the search window and click on **Go**.

Note, you can never see experiments or project belonging to other research groups unless they have added you as a user in their group.

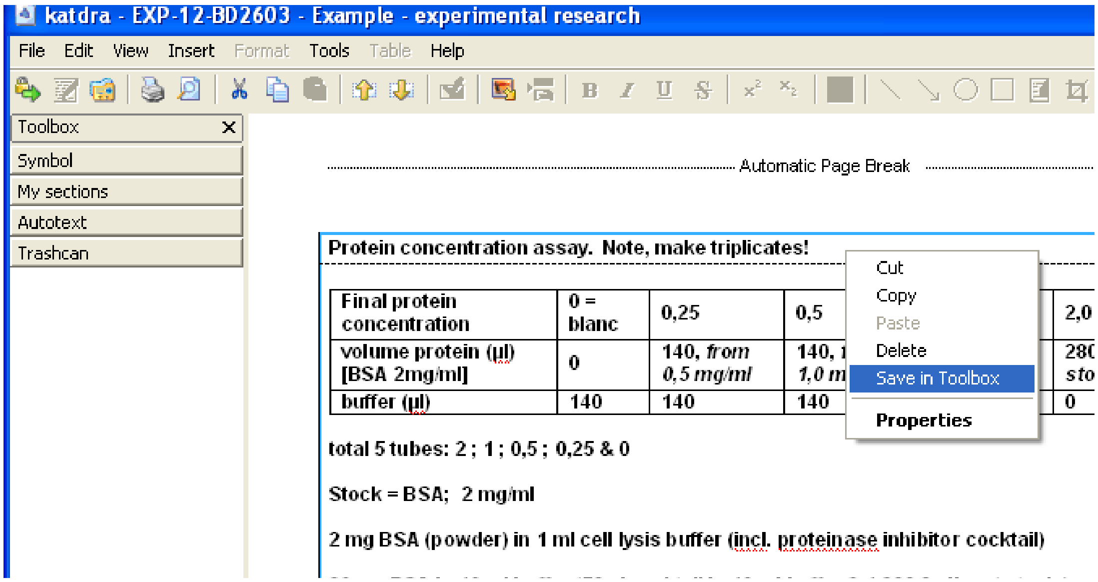
A list of experiments is returned.

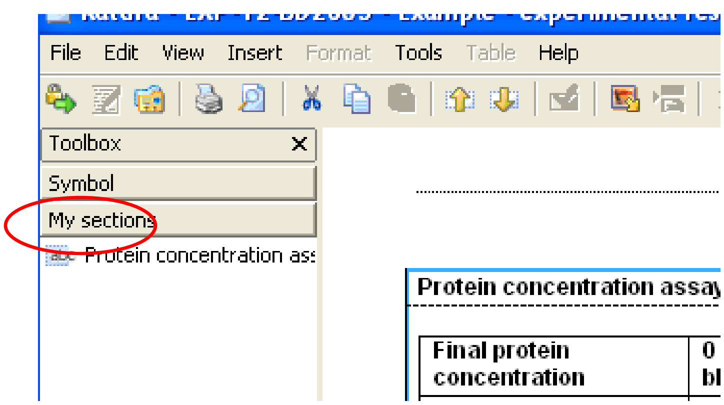


My sections

My sections allows you to save a section (your own or a colleague's) in your toolbox for future use. This could be an Excel sheet that you frequently use but is not part of a template. It could be a reaction section with certain reaction conditions. All sections can be saved in My Sections.

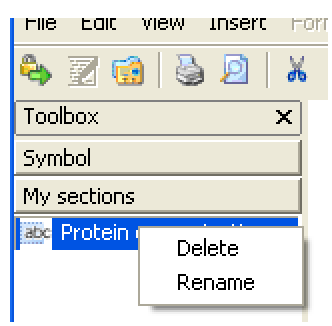
Open an experiment. Highlight a section and right-click in section area, *Save in Toolbox.*



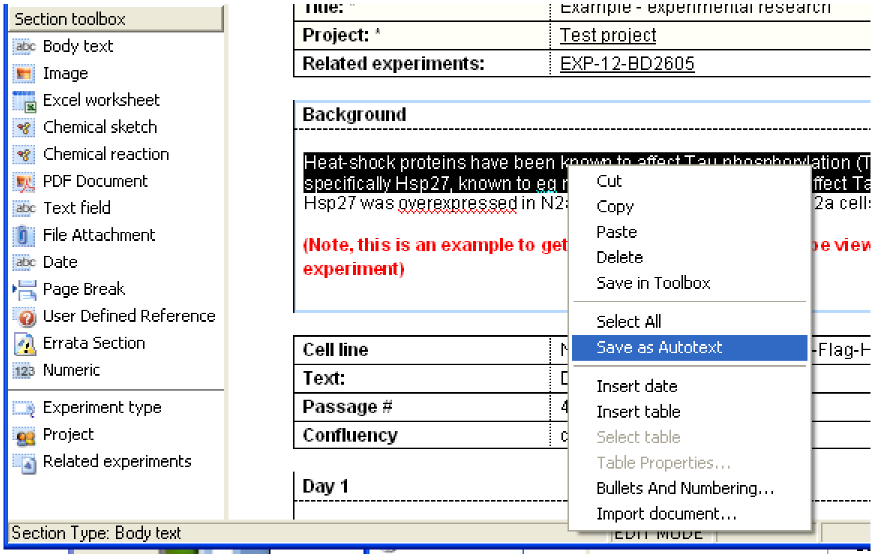


Click on My Sections in the Toolbox on the left-hand side. The section has been saved. It gets the same name as the section title from the experiment.

It can be renamed by *Rename*. The name is highlighted and the name can be edited in the same manner as a filename in Windows. Note that sections can also be deleted from the toolbox.

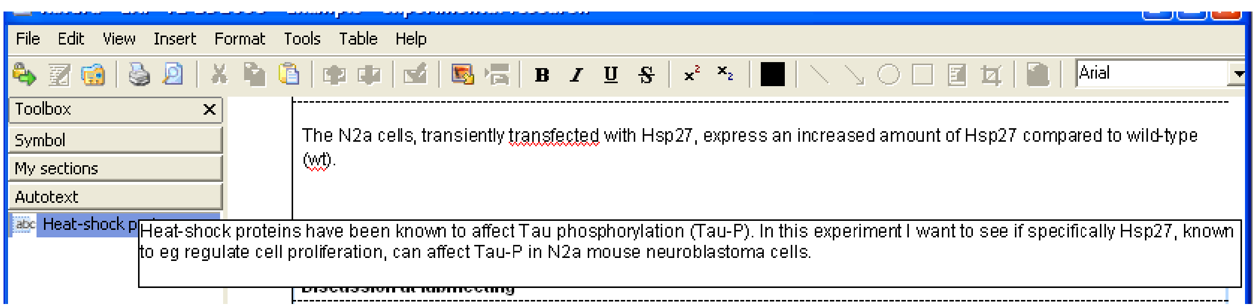


Autotext

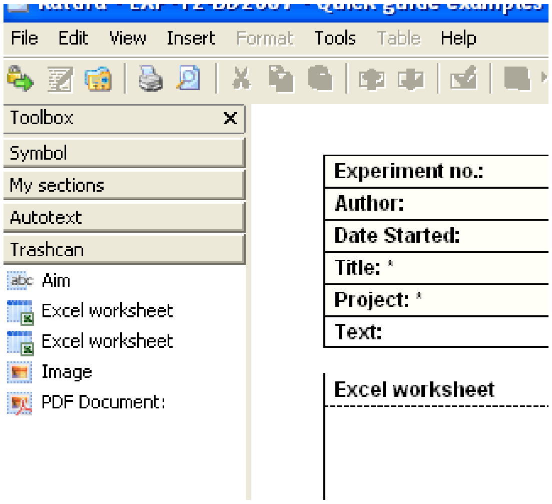


Blocks of frequently used text can be saved to an autotext button. First select the text in a body text section. Right mouse click and select the option *Save as Autotext*.

The text is now saved as a button on the Autotext toolbar on the left-hand side. The button gets the title from the first 20 letters of the text. Passing the mouse over the button displays all the text. Double-clicking the button inserts the text. Autotext buttons are only active when the cursor is in a body text section.



Trashcan (rescue of deleted sections)

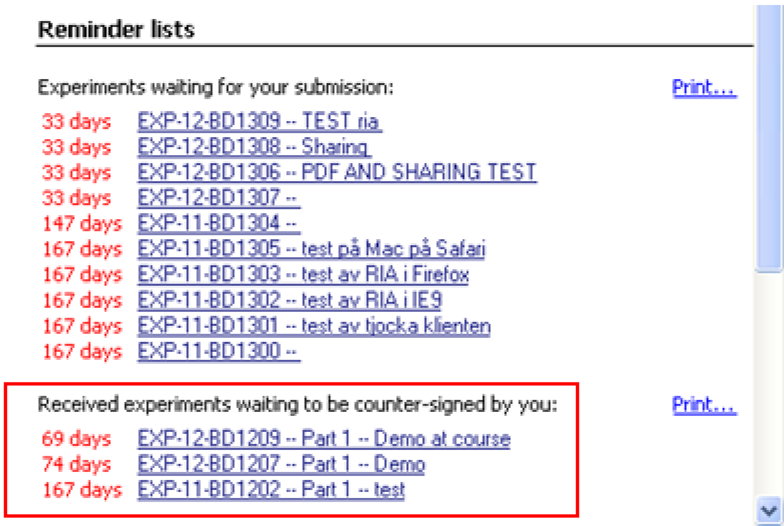


Deleted sections and content are automatically transferred to the trashcan above the section toolbox on the left-hand side. The trashcan is emptied when you log off.

The trashcan contains up to 25 items. If you delete more than 25 items during a session, the oldest will be removed from the trashcan and replaced with the latest deleted item. Most deleted objects are stored in the trashcan as sections. For example, a deleted image is stored in the trashcan as an image section. Restoring the image (by double-clicking on its icon in the trashcan) will insert a new section into the experiment. The image can then be copied or moved as required.

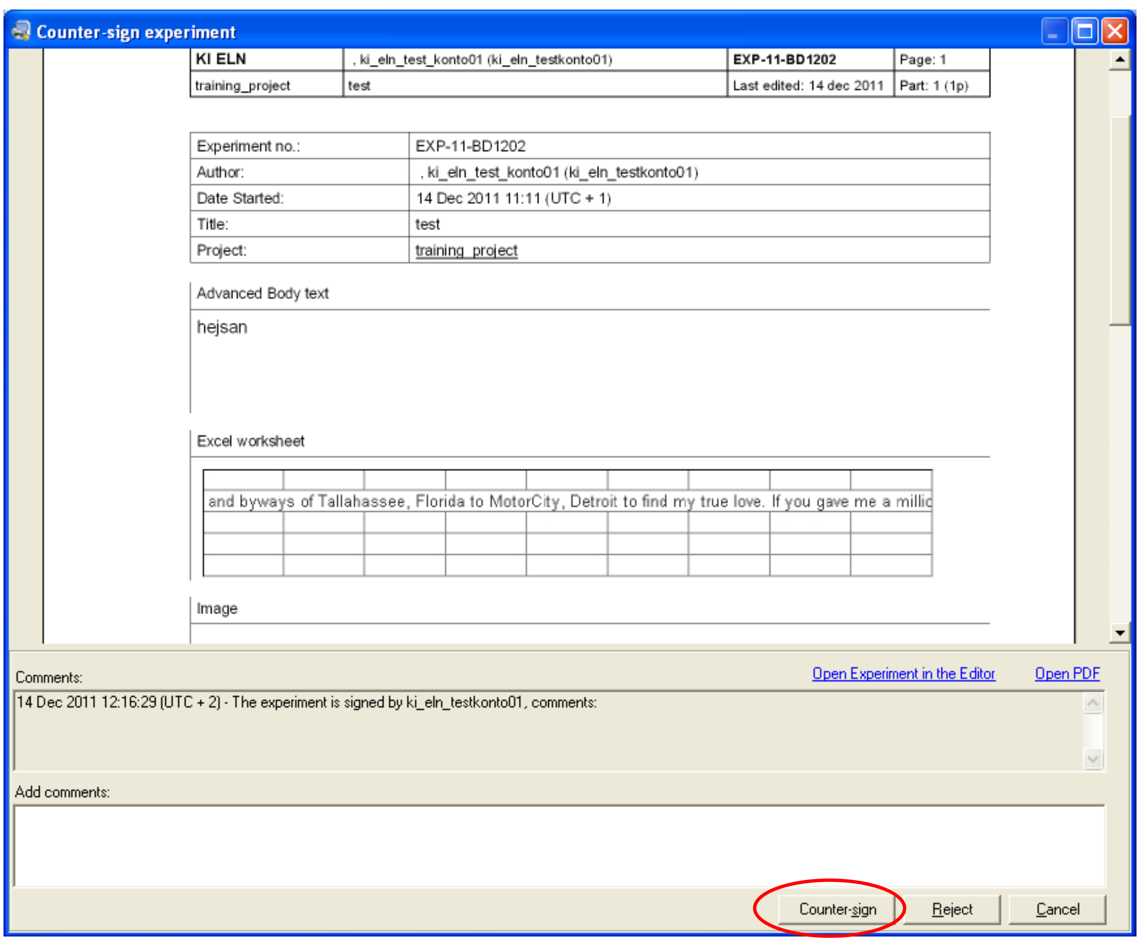
Deleted text is stored in the trashcan as a text block similar to autotext. These buttons are only active when editing a text section. Double clicking the object inserts the text into the text section.

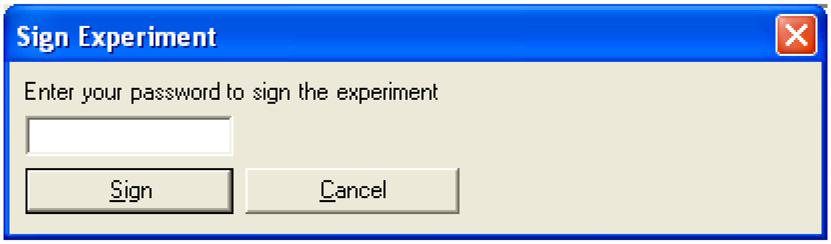
Countersigning



When a colleague submits an experiment and chooses you as the witness, it will appear in your reminder lists under the heading Received experiments waiting to be countersigned by you.
Click the experiment link to start the countersigning workflow

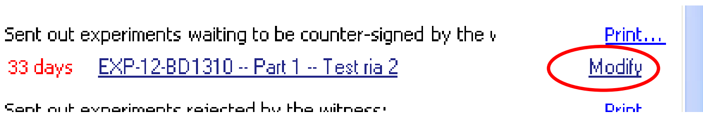
The experiment opens in the countersigning window.
Scroll down to read the whole experiment. Add any comments in the Add comments area.
Click on the **Countersign** button.





Enter your password and click on **Sign**.

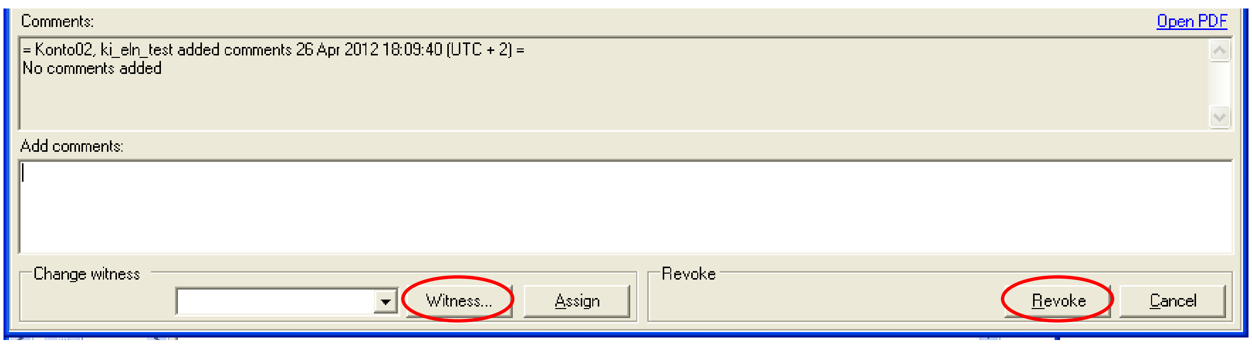
It is possible to change a witness.



Click the Modify link in your reminder list under Sent out experiments waiting to be countersigned by the witness.

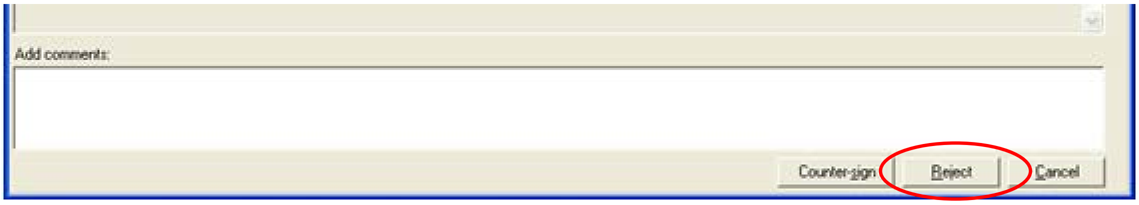
Click Witness and select a new witness. Add a comment and then click Assign.

Note you can also choose Revoke on this window to ‘unsubmit’ an experiment.

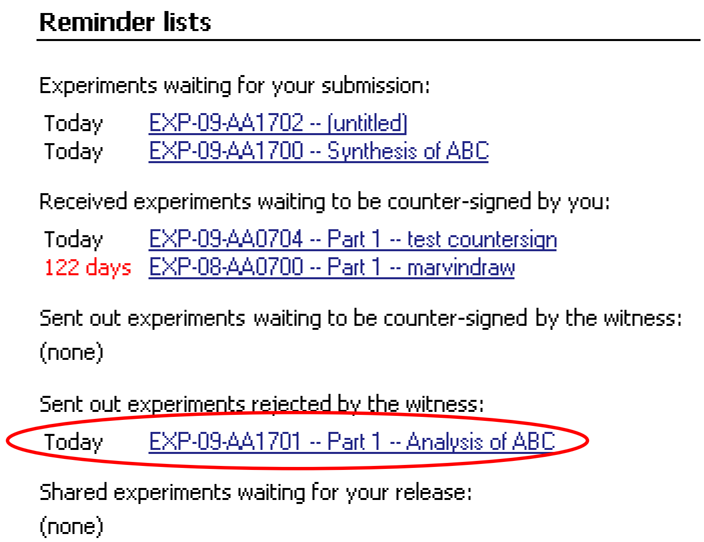


Reject experiment

If you are unhappy with an experiment, click **Reject** (comments are required) and the experiment is returned to the author.
The author sees it in their reminder lists under the heading Sent out experiments rejected by the witness.



If you are the author of a rejected experiment, click on the experiment link



You will see the countersigner's comments.
Click on Unsubmit, the experiment opens and is returned to your current experiments.